



**BSB40215 - Certificate IV in Business  
Study Support materials for**

## **BSBWRT401 - Write Complex Documents**



## **STUDENT HANDOUT**

## BSBWRT401 Write complex documents

This unit describes the skills and knowledge required to plan documents, draft text, prepare final text and produce documents of some complexity.

It applies to individuals who work in a range of business environments and are skilled in the creation of reports, information and general promotion documents that are more complex than basic correspondence, memos or forms and that require review and analysis of a range of information sources.

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1 Plan documents	1.1 Determine the purposes of documents 1.2 Choose appropriate formats for documents 1.3 Establish means of communication 1.4 Determine requirements of documents 1.5 Determine categories and logical sequences of data, information and knowledge to achieve document objectives 1.6 Develop overview of structure and content of documents
2 Draft text	2.1 Review and organise available data, information and knowledge according to proposed structure and content 2.2 Ensure data, information and knowledge is aggregated, interpreted and summarised to prepare text that satisfies document purposes and objectives 2.3 Include graphics as appropriate 2.4 Identify gaps in required data and information, and collect additional material from relevant enterprise personnel 2.5 Draft text according to document requirements and genre 2.6 Use language appropriate to the audience
3 Prepare final text	3.1 Review draft text to ensure document objectives are achieved and requirements are met 3.2 Check grammar, spelling and style for accuracy and punctuation 3.3 Ensure draft text is approved by relevant enterprise personnel 3.4 Incorporate revisions in final copy
4 Produce document	4.1 Choose basic design elements for documents appropriate to audience and purpose 4.2 Use word processing software to apply basic design elements to text 4.3 Check documents to ensure all requirements are met

Effective business writing gets results. It does this because it achieves two basic objectives. It conveys a clear and unambiguous message to a receiver but it also generates goodwill in that receiver. To achieve these two objectives, the writer must write clearly, coherently, concisely, correctly, and with courtesy and confidence. These characteristics are the result of the three-step writing process shown below.

Busy people appreciate specific information structured coherently and expressed clearly. This type of writing is effective because it enables the receiver to respond quickly. It saves them from struggling with a poorly constructed message hidden by unfamiliar language and unhelpful layout.

Three-step writing process.

Plan – Write – Complete

In the planning step:

- Define your purpose and gather information
- Develop an audience profile and determine their needs
- Match your message to the audience and your purpose
- Select the appropriate medium (paper-based or online) for your message
- Organise and structure your content into either the direct or indirect order of information.

In the writing step:

- Convey your meaning concisely, courteously, confidently
- Use a plain English writing style
- Use unbiased, inclusive language and a 'you' attitude.
- Emphasise the positive and focus on what can be done rather than criticising
- Establish your credibility and build a relationship with your audience.
- Use your organisation's signature elements to create a professional layout.

In the completion step:

- Evaluate and revise your content
- Review the document's readability, edit and rewrite.
- Use design and signature elements to project your organisation's preferred image.
- Proofread and correct spelling and punctuation errors, typos, omitted words and layout.
- Deliver your message in the appropriate medium to your intended audience.

Before you start writing you should ask yourself, "What is my reason for writing this document? What do I want to accomplish?" Then as you write focus on your purpose and adapt your message to the needs of your audience.

Before you begin writing consider audience characteristics such as:

- Knowledge and experience levels
- Level of language, literacy and numeracy
- Educational and professional background
- Economic status, political, social and religious beliefs
- Level of information the audience have about the subject – novice, general reader, specialist or expert.
- The context in which they will be reading the piece of writing (newspaper, textbook. Popular magazine, specialised journal or on the internet).

An audience without special or expert knowledge will need more background information and more definition and description supported by attractive graphics or visuals than a group of managers within your organisation.

## **The seven components of writing style**

Good workplace writing uses the following seven components of writing style appropriately.

1. Words (language)
2. Sentences
3. Paragraphs
4. Rhythm or flow
5. Tone
6. Order of information
7. Layout or format.

### **Use current technologies**

The production quality of your message – page design, typography, graphics – enhances the message. In our transition from a paper-based society to an electronic society, the means of producing documents is continually improving; however, to take advantage of the improvements each of us has to be willing to learn how to use the new capabilities. Word-processing software programs provide the easy-to-use features plus many others. Organisations need people who can use the capabilities available in the current software programs and new technologies to write and design clear business messages that people are able to understand, interpret and translate into action.

### **Evaluate and revise**

A document written in plain English enables the receiver to understand your message and respond quickly. Readers who struggle with a poorly constructed message, unfamiliar language or unprofessional layout are much less likely to respond. Evaluate and revise to ensure your document achieves its intended purpose.

## **PLANNING THE DOCUMENT**

Even the paintings of the Old Masters started out with a few rough sketches or outlines. Producing a successful business document is no different. As a writer, you will need to put in some groundwork before you are in a position to produce your own masterpiece.

You must first be quite clear about

- why you are writing
- who you are writing to
- what is the most appropriate format
- what means you will use (eg, software)
- what information you need to include
- how best to organise and present the information

There are a number of different formats that can be used for planning: bulleted lists; flowcharts; vertical charts; concept maps; templates; and even post-it notes, which allow for easy re-organisation.

Once your plan is in place, the road to a successful outcome is clear, and you may safely proceed to the next stage, using your plan as a map.

## **DETERMINING THE PURPOSE**

There are many possible purposes of business documents, but generally, it will be to do one of the following:

- provide information; eg, position description, internet home page
- respond to a complaint
- recommend solutions to a query
- provide analysis of a situation, including using statistical data
- report on a research finding
- provide information on procedural tasks
- influence someone to change their behaviour; eg, make a purchase, settle an account
- provide a quality control checklist
- promote the organisation
- write simple manuals

Your purpose or reason/s for writing and the nature of your target audience will influence all of your following decisions regarding style, format, means, content and structure, as well as choice of tone.

## **IDENTIFYING YOUR AUDIENCE**

Once you are clear about what you want to say (your purpose) in your business document, you need to consider who you will be saying it to: who will be reading your document/s (your target audience), and what will you need to tell them if you are to succeed in your purpose.

**Sometimes your audience will be a very uniform group, such as senior management. Or, you may be communicating with people of different ages and/or at different levels of responsibility. Different types of readers for the one document will have different needs, and your challenge is to try to identify and accommodate them all. This is also true of customers. Analysing your target in this way is known in the communication industry as “segmenting”. Consider what you know about them –**

For example their position in company, status in society, job role, (MD, MP) age, background, occupation, education, experience, ethnicity, location and why it is that you are communicating with them; how much do they already know about the subject/topic; what are they likely to want to know, and what will influence or interest them in particular? In short, they'll be looking for, “What’s in it for them?”

Identifying your audience and addressing their needs will ensure that their response to your document won't be, “Who cares?”

## **CHOOSING AN APPROPRIATE DOCUMENT FORMAT**

In this unit, you will look in detail at a variety of business documents and consider their suitability for different audiences and purposes. These documents include:

- detailed business letters
- emails
- instructions and procedures
- manuals
- publications, leaflets, brochures
- reports
- speeches and presentations
- submissions tender documentation and public notices
- website text

If you are not familiar with each of these types of documents and their formats, you may need to do some personal research for revision purposes. The format and usefulness of various documents will be discussed throughout this learning guide, as well as defined in the glossary. There are samples of a number of documents and remember that Microsoft Office has a range of templates for business documents of all sorts and there are even more available online.

## **DRAFTING THE TEXT**

A draft is the first rough copy of your document. How many drafts you prepare depends on the importance of the document, your level of skill/familiarity with the subject and how much time you have available.

At the draft stage, concentrate on the content and that the structure is logical and flows well. You may decide to move ideas around or that you need to include more information.

Organising relevant information to suit audience and purpose

Your choice of information sources will depend on both the purpose of the document and your intended audience. When you have all the information, go through it and decide which is the most useful.

Record the source of the information at the time you access it, to save time going back to verify it later. It is the source of the information which gives it its value, and in turn, gives your document its credibility.

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